



Probate & Other Fiduciary Bond Questionnaire

Heather Duffy
D: 732-256-3420
F: 732-574-8001

Heather.Duffy@assuredpartners.com

Administrator, Guardianship Minor/ Incompetent, Trustee Under Will or Deed,
Unclaimed Property & Other Miscellaneous Bonds

Personal Information

Name of Applicant: _____

Mailing Address: _____

Street Address _____ Apartment/Unit # _____

City _____ State _____ ZIP Code _____

Phone Number: _____ Social Security Number (Need for eligibility): _____

Email Address: _____ Age of Applicant: _____

List applicant Assets (Savings, Investments): _____

List applicant Liabilities: (Credit Card Debt, Mortgage) _____

Type of Bond: Administrator Guardianship of Minor Guardianship of Incompetent Trustee Under Will/Deed

Miscellaneous: _____

Bond Information

Type of Bond: _____ Amount of Bond: _____

Name of Deceased/ Minor/Incompetent: _____ Docket Number: _____

Age of Minor/Incompetent: _____ Birthdate of Minor: _____

Assets & Liabilities of the Estate

Cash: _____ Securities: _____

Real Estate: _____ Miscellaneous: _____

Liabilities of Estate: _____ Other debts: _____

Is there a will? _____ Contest of will? _____

(a). Administrator: list heirs (b). Trustee Under a Will: list beneficiaries & ages (c). Guardian of Minor: List minors and ages

Name: _____ Age _____ Relationship _____

Name: _____ Age _____ Relationship _____

Name: _____ Age _____ Relationship _____

Name: _____ Age _____ Relationship _____

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